

Client Name: _____

Contact Person / Role: _____

Date: _____

Role Title: _____

1. ROLE OVERVIEW

- Why does this role exist?

- What does success look like in 12 months?

- How does this role impact customers and revenue?

2. KEY RESPONSIBILITIES

(List 5-7 major tasks, tied to outcomes, not just duties.)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

3. CUSTOMER EXPERIENCE KPIS

(Which CX metrics will this role directly move?)

- NPS / CSAT
- Churn %
- Customer Lifetime Value (LTV)
- First Contact Resolution
- Average Response Time
- Onboarding Conversion %
- Retention / Repeat Purchases
- Other: _____

4. REVENUE & BUSINESS IMPACT

How does this role protect or grow revenue?

(e.g. reducing churn saves £X, improving conversion adds £Y)

Top 3 measurable outcomes expected in first 12 months:

1.

2.

3.

5. CULTURE & TEAM FIT

- Company values / behaviours that matter most:

- Leadership / team style:

- Traits that thrive here (and those that don't):

6. CANDIDATE PROFILE ESSENTIALS

- Must-have skills / experience:

- Nice-to-have (but not essential):

- Dealbreakers (no-go criteria):

7. HIRING PROCESS

- Stages (interviews, tests, presentations):

- Target start date: _____

- Budget / Salary Range: _____

- Benefits:

YOURCXC LENS:

This isn't just about filling a role. It's about finding someone who can:

- **Fix customer leaks**
- **Drive retention & growth**
- **Fit the culture so they stick**

That's what we capture before we ever source a CV.